

Chapter 1. Introduction to ARIS

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Introduction

The Agricultural Research Information System (ARIS) is the key program management information system for the Agricultural Research Service (ARS). The system is a project documentation and retrieval system, containing information on all in-house research as well as all extramural research and projects in cooperation and collaboration with outside institutions. The system holds information pertaining to all aspects of the research projects, funding levels, publications and progress, and personnel. There are numerous subsystems within ARIS that are used throughout ARS, by a variety of personnel from the Research Unit level, to the ARS Administrator level. The subsystems within ARIS include: Research /Agreements, Post-Doctoral, Inventions/Licenses, Foreign Travel, Admin (HQ only), Correspondence (HQ only), and Frozen Budget (HQ Only).

Acronyms and Definitions

See Acronyms and Definitions in the ARIS Online Manual at

<http://www.npstaff.ars.usda.gov/ARIS/Manual/Acronyms%20and%20Definitions%20Revised%20June%202005.pdf>.

ARIS Access - Requirements

Registration

ARIS is a secure system, therefore a User ID and password is required to access the system from your office and/or offsite. A Registration Form must be completed by each user to receive a User ID and password. Follow the steps below to obtain the form. **Note:** Each Area may have different access requirements. Therefore, check with your Area Program Analyst (PA) for more information pertaining to your Area requirements. **NOTE:** All User ID requests must be submitted through your respective Area Office.

In Internet Explorer, enter the URL: <https://arisapp.ars.usda.gov> to get to the ARIS Security screen. At the ARIS Security Warning screen (fig. 1.), click “I Agree” to open the Application Main Menu screen (fig. 2).

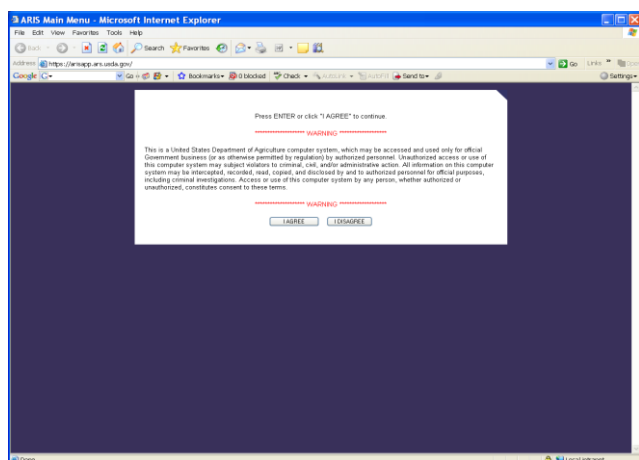


Fig. 1 – ARIS Security Warning Screen



Fig. 2 – Application Main Menu Screen

From the Application Main Menu screen, click on “**Registration**” (fig. 2) to display the Registration Forms screen (fig. 3a).



Fig. 3a – ARIS Registration Form

Click on the [E-Forms - ARIS, ARMP, ATS, FDMIS, SAMS, and WATS](#) line which will take you directly to the Registration Form (fig. 3b).

Fig. 3b – E-Forms - ARIS Registration Form

Complete the registration form and route it to your Area Program Analyst. **Note:** Each Area may have slightly different requirements. Please consult with your respective Area Office for further guidance.

System Requirements

There are multiple system requirements that allow ARIS to work correctly. They are as follows:

- Microsoft Internet Explorer (minimum – 6.0 version; 7.0 also is compatible)
- Adobe Acrobat (Reader / Professional or higher)
- JInitiator – First time users must install (see Appendix B for instructions)
- Popup blockers must be turned off
- ARISAPP*. * must be made a trusted site

Mode Code Access

All ARIS Subsystems, except Post-Doc and Licenses/Inventions, have a 4-digit Mode Code security, which means anyone at the location level has access to the records for that location. The Post-Doc and Licenses/Inventions have the full 8-digit mode code security, which means that the user is required to have access to that specific Management Unit. Therefore, if a user at the RL level needs to enter data for either of these subsystems, additional security level access may be required.

Logging On

To login to ARIS, go to <https://arisapp.ars.usda.gov>. Once entered, save it on your desktop for future use and ease in entry.

At the ARIS Security Warning screen (see fig. 1), click “**I Agree**” to open the Application Main Menu screen (see fig. 2). Click “**ARIS**” to display the Unified Login screen (fig. 4a). Enter your Username and password and click “**Login**” (fig. 4b).

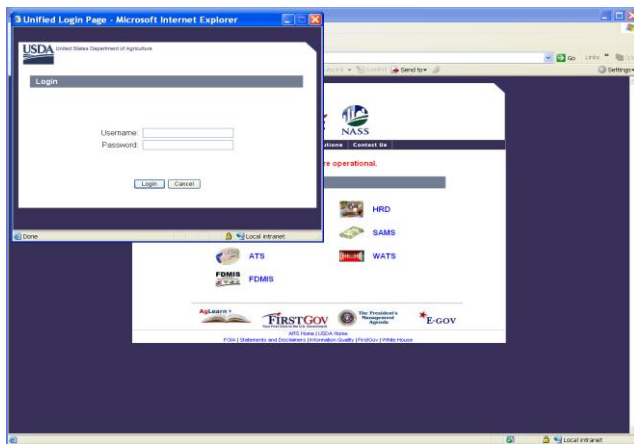


Fig. 4a – Unified Login Screen

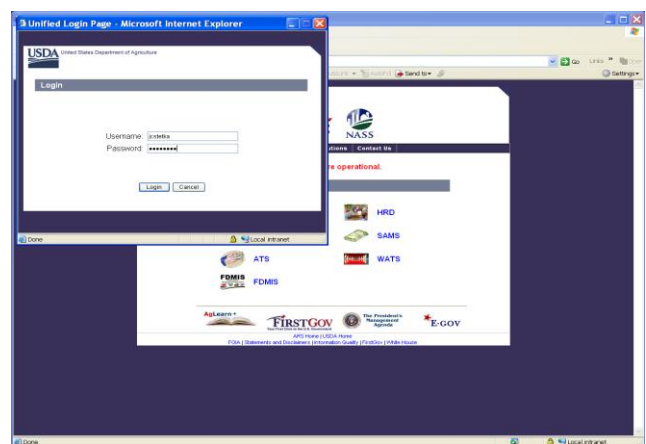


Fig. 4b – Login Screen - Completed

The ARIS Main Splash screen will be displayed (fig. 5).

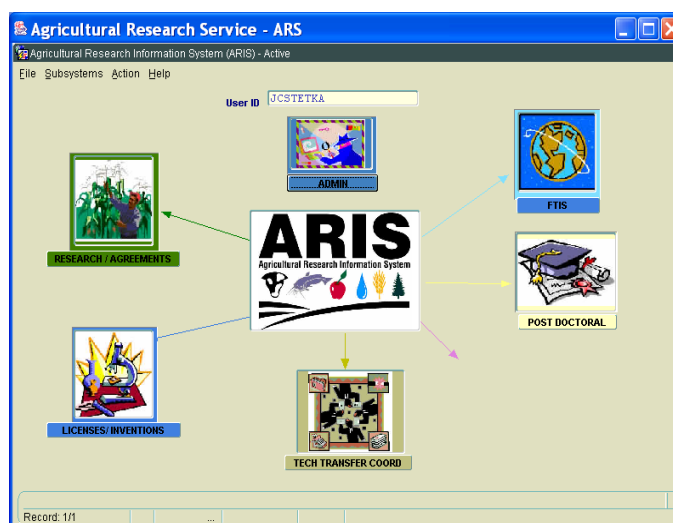


Fig. 5 – ARIS Main Splash Screen

If you have access to more than one Mode Code, when selecting a subsystem, an additional box will be displayed listing the Mode Codes available to you. Highlight the Mode Code you need and click “OK” (fig. 6).

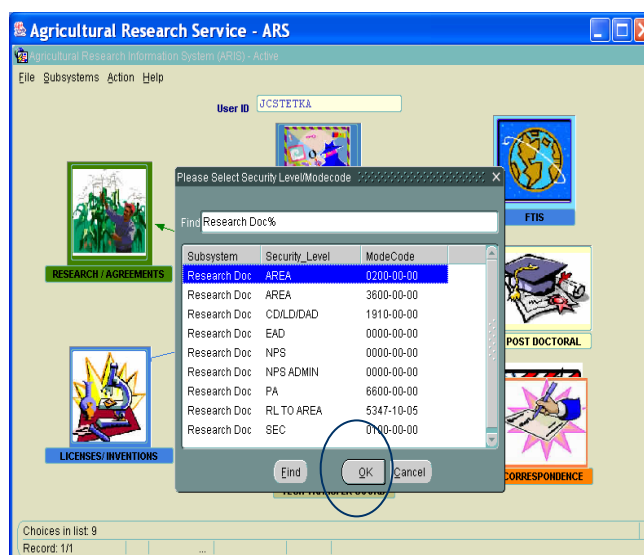


Fig. 6 – Select Mode Code Access

If you forget your password, and/or you try unsuccessfully three times to login to the system, you will be locked out. To unlock your User ID, you must send a message through your Area PA to request your ID be reset. You will then be notified that your ID has been reset and your password changed. Once reset, you will have to go in using the designated password and change it to a new password.

Every 60 days you will be required to change your password. You cannot change it any sooner.

Logging Off

To log off the system, click “**File**” and “**Exit**” on each screen, until you are completely out of ARIS. If you are not using ARIS for extended periods of time during the day, it is best to log off and then log back in when needed. There is a 30 minute idle time automatic logoff.

ARIS Features and Functions

Subsystems

Each icon on the ARIS Main Splash screen represents a subsystem you can access by clicking the icon or the words on the Menu bar and selecting options from a drop-down list of values (LOV) (fig. 7). Note: If items are grayed out, this indicates your access does not allow entry into that area of the system.

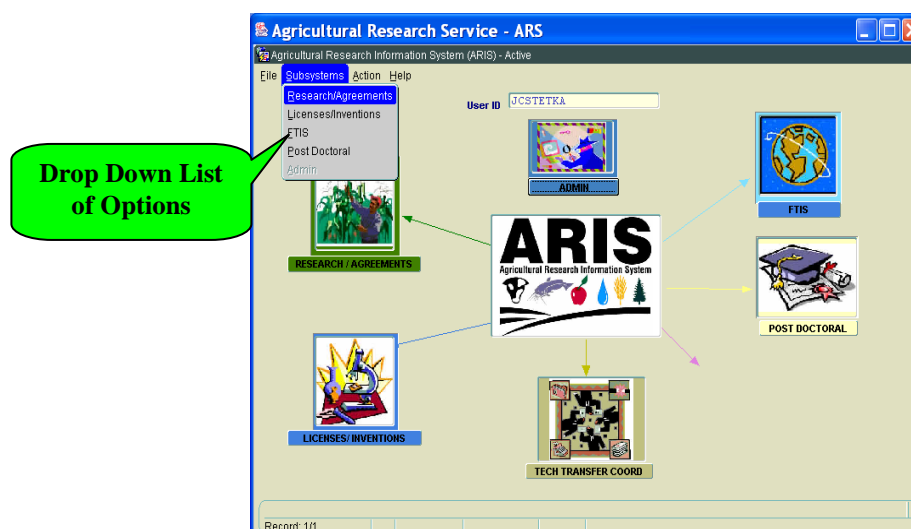


Fig. 7 – Main Splash Screen – Subsystems

Subsystem Options	Content
Research/Agreements	Active and work files for AD-416/417s, Incoming and Outgoing Agreement information, Agreement Information Management System (AIMS) data, and ARS-115s.
Licenses/Inventions	Active and work files for all patents, licenses, inventions and germplasm releases.
FTIS (Foreign Travel Information System)	All foreign travel and passport information for ARS personnel and travel for Non-ARS personnel that ARS is funding.
Post Doctoral	All of the Administrator's Post Doctoral Program information is entered and administered through this subsystem, including data entry for post-doc proposals, rankings, funding for awarded proposals, and prior year's history of awards.
Tech Transfer Coord	Only available to Technology Transfer Coordinators.
Admin	Used by Headquarters for system maintenance, and by Areas for administrative reports related to user IDs and security.

Menu Bar and Tool Bar Use, Features, and Options

There is usually more than one way to perform an action in ARIS. In many cases, the menu bar and tool bar have options that will perform the same functions. Figures 8a and 8b displays the location of the Menu and Tool bars and the tables that follow describe each option in the Active and Work files. **Note:** throughout ARIS, these menu and tool bars will be available. In each subsystem and location, the functions are all uniform in use and function.

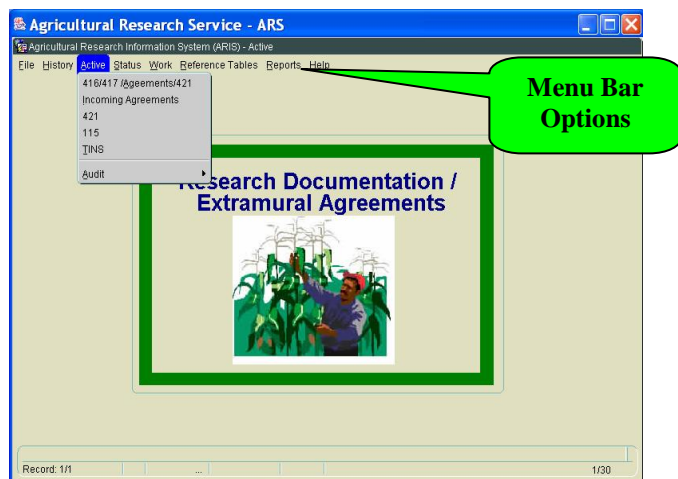


Fig. 8 – Menu Bar – Research Doc screen

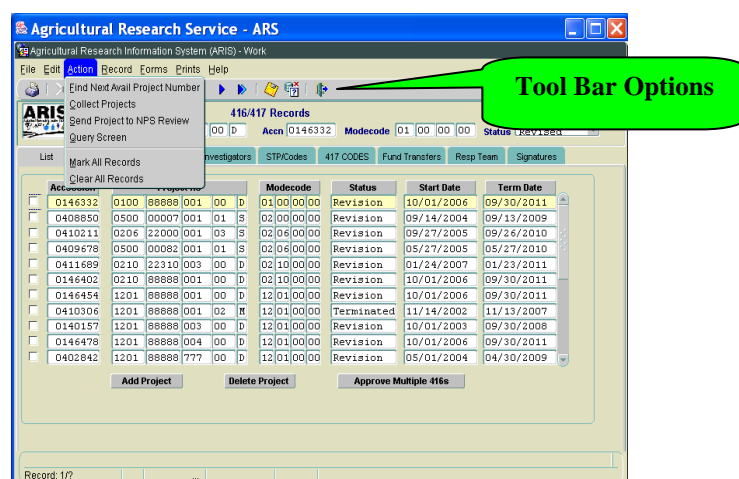


Fig. 8b – Tool Bar from Work or Active

Menu Bar Options from Research Documentation/Agreements Main Screen:

Menu Bar Options	Actions
File	Exit current screen and return to previous screen.
History	View 115s greater than 5 years old; view AIMS data prior to last approved action.
Active	View active 416/417s, incoming and outgoing agreement information, AIMS data, 421s, 115s, TINS; Create work records; Perform queries; Print reports.
Status	View “Status” of work records for 416/417s, incoming and outgoing agreements, 421s, 115s, TINS, fund transfer releases and returns.
Work	Find next available project number; Add new projects; Modify work records of 416/417s, incoming and outgoing agreements, AIMS data, TINS; Mission Statement; View status of Peer Review actions; View NPS Review status; View funding returns and releases (ABFOs and AOs only) .
Reference Table	View and print Reference Tables (Budget, Organizational, Personnel, Classification, and Miscellaneous).
Reports	Query, view and print reports.

Menu Bar Options from within Active or Work:

Menu bar Option	Action	
	In Active	In Work
File	Print the screen or exit.	Print the screen or exit.
Edit	Cut (Ctrl X), copy (Ctrl C), paste (Ctrl V), undo and edit options are available throughout ARIS & function like any other Windows based program. Note: It is always preferable to use Ctrl X, C, V.	
Action	Create work records, mark records (or clear marked records) for action, send to peer review, open query screen, display summary project information (total number of projects, number of SYs, Net to location dollars, net to location dollars by SY).	Find next available project number; Collect projects (CD/DAD, Area & NPS only); Send Project to NPS Review (NPS only); Open query screen; Mark (or clear) all records for action.
Record	Go to first record (◀◀), previous record (◀), next record (▶), or last record (▶▶).	
Forms	Display associated incoming and outgoing agreement documentation, Agreement Info (AIMS). Display 421s with associated 416, 115 data.	Display Agreements (incoming and outgoing, Agreements Info (AIMS); Display, modify, or add agreement documentation; Display 421 with associated 416, 115 data.
Prints	Print project 416/417, incoming agreement info, outgoing agreement info, AIMS Agreement Info, 421 Questions, 115 and Budget Transactions; output data to external files.	Print project 416/417, incoming and outgoing agreement info, AIMS agreement info, and 115.
Reports	Prints reports.	Not applicable.
Help		
Field Help	Provides information about the field where the cursor is located.	
Record	Provides the User ID of the person who last modified the record, the date of the modification, and the User ID of the person who created the record with the creation date.	
Help	Not used by Field users.	
Last Query	Provides a description of the most recent query.	
Order By	Not applicable to field users.	

Menu bar Option	Action	
	In Active	In Work
Display Error	Not used by Field users.	
About	Not applicable to field users.	

ARIS Symbols and Features

The following symbols and features are used throughout ARIS on the tool bar as well as on query screen, and data input screens. They are all uniform in functionality throughout the system and throughout other systems on the Oracle platform.

* Indicates a required field.



Indicates a List of Values (LOV) is available for the field. The LOV can be queried for the appropriate value.



= indicates a List of Values (LOV) is available for the field. The list contains all the available values for the field and **must** be used to select the appropriate value.



Tabs

Tabs allow you to select different data screens within a selected (highlighted) project to enter data or view project information. Tabs are available in “Work”, “Status”, and “Active” data, query, and report screens.



Copy, Cut, Paste

These buttons are located on the Tool bar throughout ARIS and work the same in ARIS as in any other Windows-based program. But, because a separate window opens when entering or editing an abstract or interpretive summary, you must use the keyboard Ctrl C/X/V to perform these functions. **Note: It is always preferable to use Ctrl C/X/V.**



Add Button

The “**Add**” button is available throughout ARIS to enter data. When an “**Add**” button is displayed, click the button to display a blank data entry line and activate the “?” to query the LOV for the data to enter. If needed, click the “**Add**” button again to add another blank data line and query the LOV for additional data. **Note: Do not click the “Add” button after completing the last data entry line. ARIS will add another blank data line and you will have to delete this blank data line before continuing to the next data entry screen.**

**Exit Screen**

Use this button to exit the current screen.

**Editor Box**

Opens an editor box for easier viewing or editing text in a field without having to use the horizontal scroll bars.

**Print Screen**

Prints the current screen.

**Clear Query**

Clears the current query criteria.

Querying

Query Symbols

The following table lists and describes the symbols used to query in ARIS. Querying capabilities are available in all fields on the query screens and LOVs are available wherever there is a “?” next to the field data entry box.

Query Symbol	Meaning and Use
: (colon)	Range/Between: Used as a separator between the start and end values in a range. Can be used for all data types, including dates. (Example - 10/1/01:9/30/02 retrieves all records with values on or between the two dates)
; (semicolon)	Or: Used as a separator in a list of query items in a single line, i.e. potato;tomato. Retrieves all records with potato or tomato. Note: A line cannot end with a semicolon, i.e. tomato;potato;
! (exclamation point)	But Not: Used to narrow query criteria, i.e. A:X!E;U queries for all projects A (active) through X (expired) but not E (terminated) or U (unfunded). Note: Cannot be used in every searchable field.

Query Symbol	Meaning and Use
% (percent)	Used as a “wildcard” to broaden query criteria. The % is used before, after, or before and after the query string.
Note: It is always preferable to use the % at the end of every query string.	<p>The query for “germ%” retrieves all documents that contain “germ” as the first 4 letters in any word, i.e. germplasm, germination, and germicide. etc.</p> <p>The query for “%type” retrieves all documents that contain “type” as the last 4 letters in any word in the document, i.e. phenotype, genotype, type.</p> <p>The query for %plasm% retrieves all documents that contain the letters “plasm” in any word, i.e germplasm or plasma.</p> <p>The query for %biological%control% retrieves all documents that contain the word “biological” and the word “control” in any order, i.e biological control of plant diseases, biologically-based disease control, etc.</p> <p>The query for %biological control% retrieves only documents that contain the string “biological control”.</p>

Basic Query Screens and Examples

There are two types of query screens available within ARIS – Active/Work Menu queries and Ad Hoc queries. To query Active records, click “**Active**” on the Menu bar, then select the type of record you want to query. To query Active 416/417s, click the option “**416/417 Agreements/421**” (fig. 9) to display and enter data on the query screen (fig. 10a).

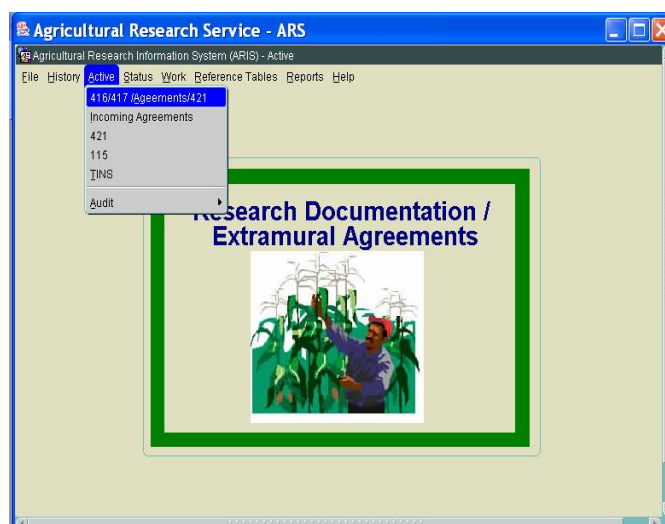


Fig. 9 – Active 416/417 Agreements

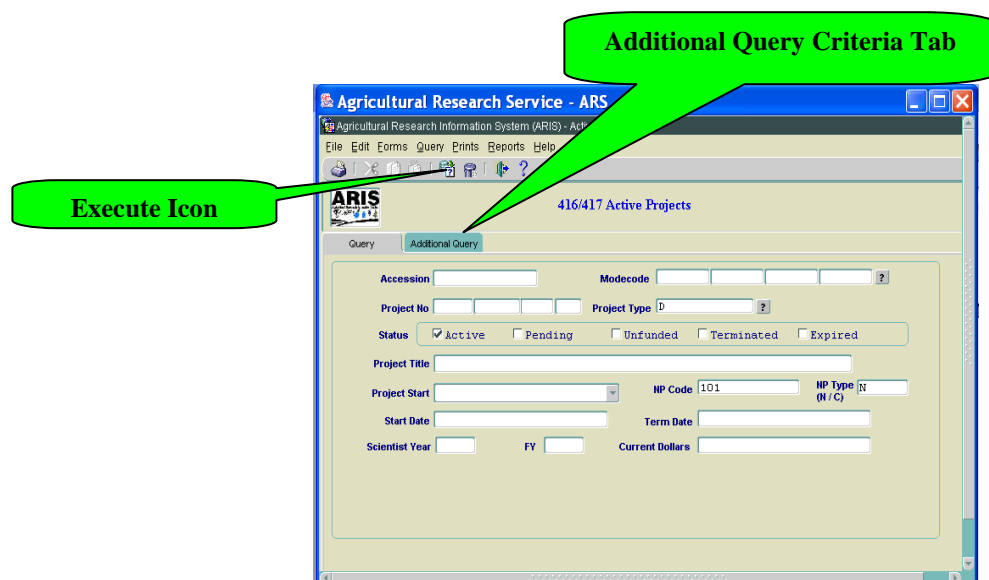


Fig. 10a – Active Projects Query Screen

Click the “**Additional Query**” tab to enter additional query criteria as needed (Fig. 10b). After adding all the query criteria, click “**Query**” on the Menu bar, then “**Execute**” or click the **Execute icon** on the tool bar, or “**Enter**” on the keyboard.

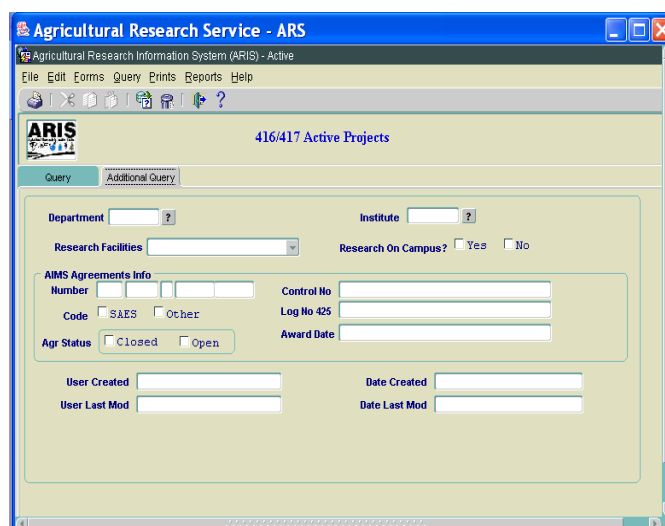


Fig. 10b – Additional Query Criteria Screen

When executed, the query results are displayed on a List screen (fig. 10c). The bottom left side of the screen lists the count of records found, i.e., 2 of 34. The highlighted line indicates the location of the cursor. Use the keyboard arrows or the Tool bar icon arrows to move through the records.

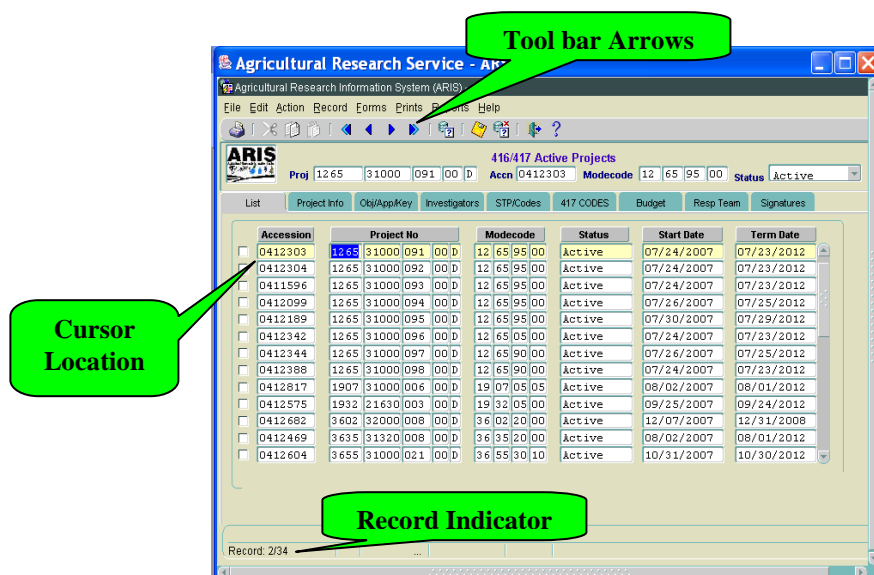


Fig. 10c – Active File List Screen – Query Results

Sorting, Viewing and Printing

From the List screen, you can sort, view, and print information, as well as create “work” records.

To sort, click any Column Heading, i.e., “Term Date” and the records will sort in ascending order by “termination date” (fig. 11). Click the column heading again, and the records will sort in descending order. The sort function is available on any List screen throughout ARIS that has the gray column headings.

To view a record, place your cursor on or mark the record/project to be viewed, then click from tab to tab to view the information in each section.

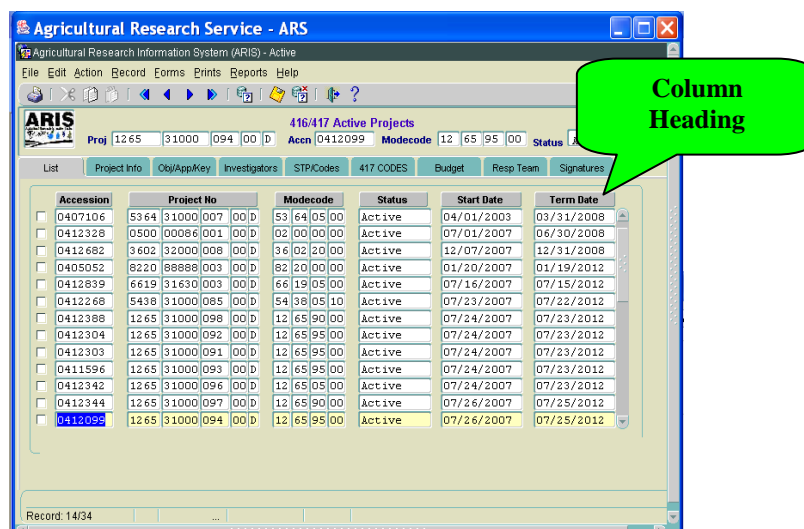


Fig. 11 – List Screen – Sort by Term Date

To print, select the record(s) by placing ✓ in the box(es) to the left of the record. Click **“Prints”** on the Menu bar and select a print option, i.e., AD-416/417, All Pages (fig. 12). Adobe Acrobat opens and displays the print file (fig. 13). Click the printer icon to print.

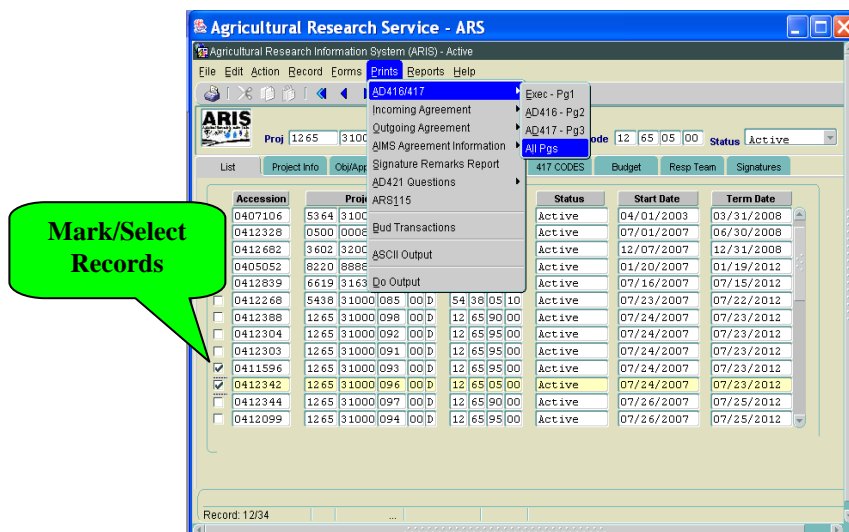


Fig. 12 – List Screen – Print Options

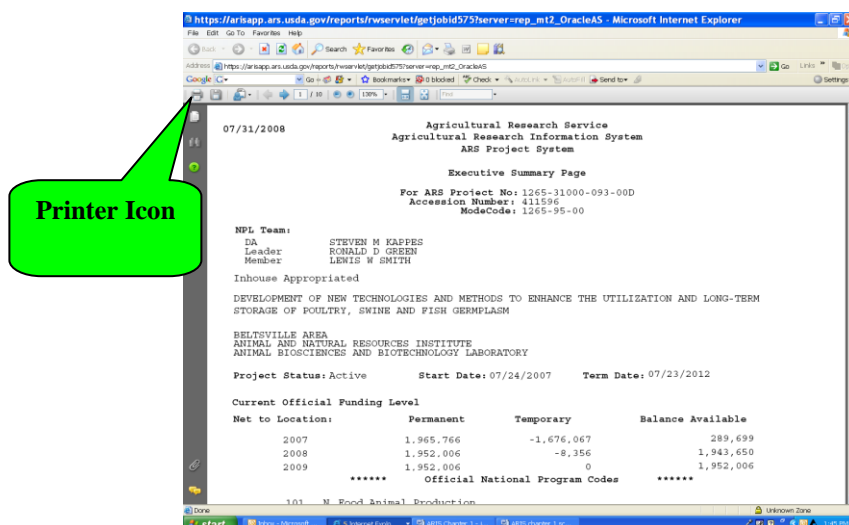


Fig. 13 – Adobe Acrobat Print Screen

Querying using LOVs and Characters

Listed below are examples of query screens, data entry, and query outcomes using LOVs and query symbols.

Figures 14a – 14c demonstrates a query from the Active 115 system, for all ARS-115s, in the Beltsville Area (mode code 12), with an ARS Approval Date of 10/1/06 through 9/30/07; and the term “Biological Control” in the Manuscript title.

Fig. 14a – Active 115 – Query Screen

Accn No.	Project No.	Date Created	Log No.	Modecode	Submitter (Last, FI)	Approval Date
0406899	1275 21220 201 00	06/05/2007	0000212207	12 75 53 00	BAILEY B	06/06/2007
0409942	1275 22000 238 00	05/29/2007	0000211985	12 75 41 00	KONSTANTINOV A	05/31/2007

Fig. 14b – Active 115 – List Screen

Fig. 14c – Active 115 – View Project Info

Figures 15a – 15b demonstrates the use of a List of Values (LOV) when there is no query option, but instead a check list to select data from. In the Active 416/417 query screen, the selection of Project Type has this feature. In this option, you can select more than one Project Type. The system will then insert these project types in the query screen, separated by semicolons (;).

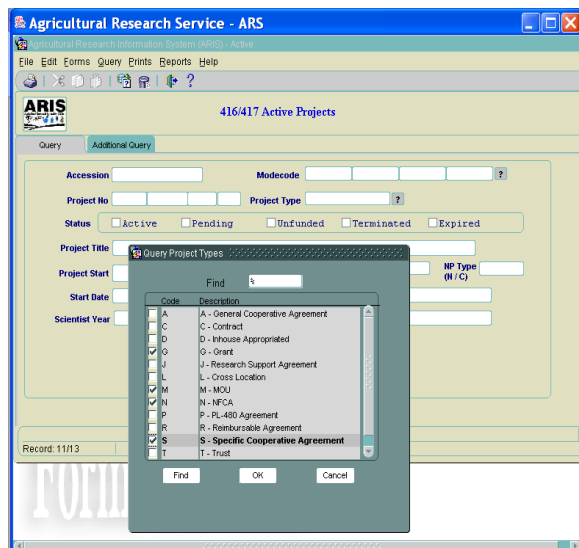


Fig. 15a – Active 416 – Project Type LOV

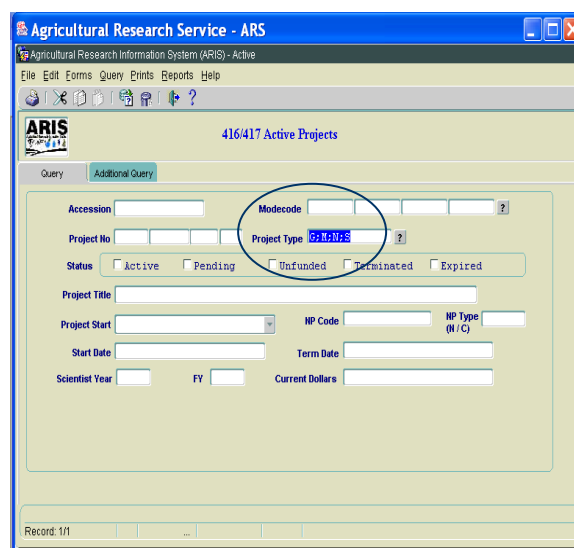


Fig. 15b – Project Type on Query Screen

Figures 16a – 16d demonstrates the searchable LOV feature. The “?” on the query screen indicates either a searchable LOV or a selection LOV (as indicated in Fig. 15a-b). The searchable LOV contains all the available data for that field.

In the LOV query screen, the % acts as a “wildcard” and as a column separator. It is not necessary to use the % if you are searching the first column. However, if searching other columns, you should always use the % before and after the data.

To query all Active or Pending, Outgoing Agreement types (S; G; M; N) in **Dubois, Idaho**, click the “?” to the right of the Mode Code field on the query screen. The searchable LOV will be displayed (fig. 16a). Enter “Dubois” on the find line (fig. 16b) and click “Find.”

Note: The % is the only query symbol that can be used in the LOV; A LOV query also accepts spaces.

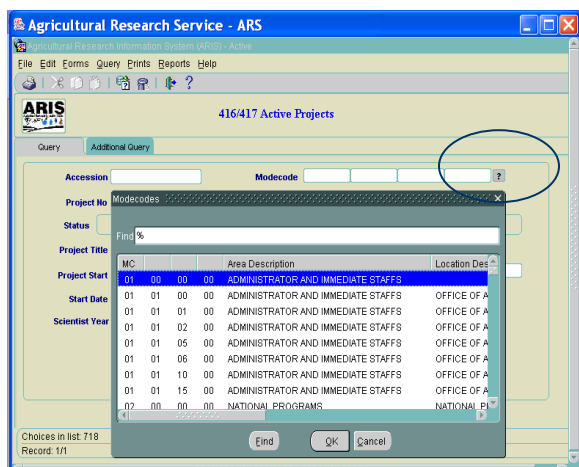


Fig. 16a – Active – Mode Code LOV Query

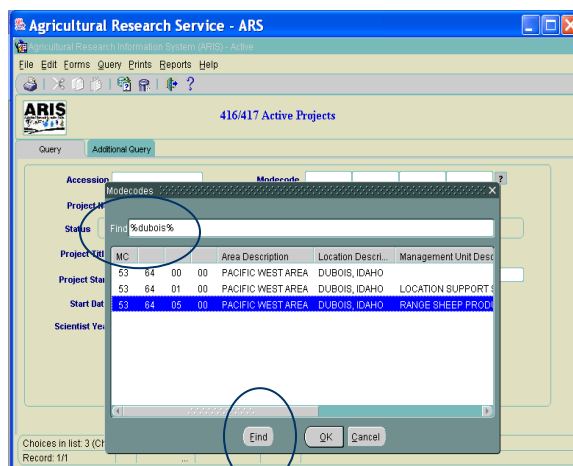


Fig. 16b – LOV Query – by Location

A list meeting the criteria entered will be displayed. Scroll through the list to find the appropriate unit. Once found, highlight it and click “OK”. The Mode Code will then be entered on the query screen (fig. 16c). Once all data is entered on the query screen (e.g., project types, project status and mode code(s)), execute the query (fig. 16c). A list screen will be displayed with all projects that met the criteria (fig. 16d).

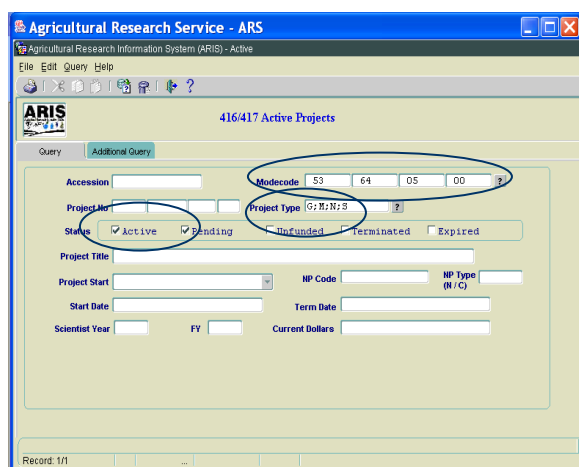


Fig. 16c – Active Query – Data Entered

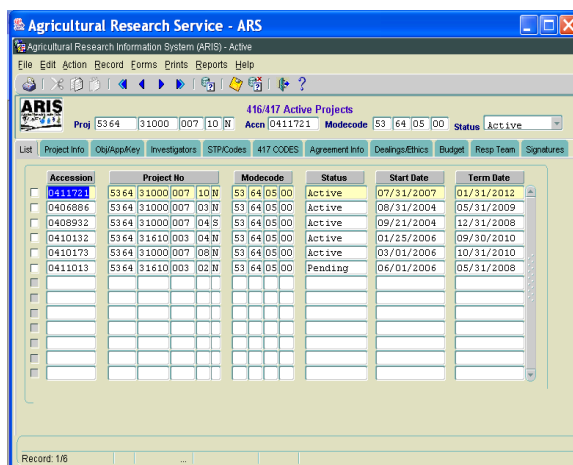


Fig. 16d – Active – List Screen

Additional Information

Header Line

A Header Line is displayed on list screens as well as other screens. The Header Line displays information about the project at the current cursor location. The Header Line is informational only and cannot be modified. As you scroll through projects in the various “tabs”, you can always see what project no., accession no., or mode code you are on via the Header Line.

Marking and Clearing Records

To mark project records for action (to print, create work records, etc.) click the small box to the left of the project number to insert a check mark. To clear a marked box, click it again. To mark or clear all records, click “**Action**” on the Menu bar. Choose the option “**Mark All Records**” or “**Clear All Records.**”

Contact Information

If you encounter a problem:

- The **FIRST** contact is Your Area Program Analyst
- For computer related assistance, contact your Area Computer Specialist
- For all ARIS issues (other than computer related, i.e. unable to log in), contact Jill Stetka: (301) 504-4581.
- Contact ARIS Help Desk, 301-504-1074, aris@aris.usda.gov, to reset passwords **only**
- Link to On-Line ARIS Manual: <http://www.npstaff.ars.usda.gov/ARIS/Manual/>

Appendix A

United States Department of Agriculture Research, Education, and Economics Agencies			
USER REGISTRATION FORM (ARIS, ARMPS, ATS, CATS, FDMIS, MAT, SAMS AND WATS)			
SECTION I - USER ACCOUNT			
1a. LAST NAME	1b. FIRST NAME	1c. INITIAL	6a. ORGANIZATION NAME AND FULL MAILING ADDRESS
2. POSITION TITLE			
3a. TELEPHONE	3b. EXTENSION	4. FAX	
5. EMAIL ADDRESS		6b. CITY	6c. STATE 6d. ZIP CODE
SECTION II - SYSTEM ACCESS			
7. SYSTEM NAME			8. REQUEST DATE
9. REQUEST TYPE (check one)	10. OTHER SYSTEMS USED		11. ROLE
<input type="checkbox"/> NEW <input type="checkbox"/> MODIFY <input type="checkbox"/> DELETE	<input type="checkbox"/> ARIS <input type="checkbox"/> CATS <input type="checkbox"/> MAT <input type="checkbox"/> ARMPS <input type="checkbox"/> FDMIS <input type="checkbox"/> SAMS <input type="checkbox"/> ATS <input type="checkbox"/> HRD <input type="checkbox"/> WATS		12. APPROVAL TRIGGER (ARIS only)
			13. PA APPROVAL (ARIS only)
14. MODE CODE (ARIS, ARMPS, CATS and SAMS only) ex: 1230-05-00			
15. OTHER MODE CODES ACCESS NEEDED			
A. _____	D. _____	G. _____	J. _____
B. _____	E. _____	H. _____	K. _____
C. _____	F. _____	I. _____	L. _____
16. COMMENTS			
SECTION III - DBA USE ONLY			
17. ASSIGNED USER ID	18. ASSIGNED PASSWORD	19. DATE	20. DATE USER ADVISED

 ROUTE APPROVED FORM TO:
ARIS REGISTRATION

Appendix B

